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ABSTRACT

Library staff training methods and training manual construction should be part of the overall implementation plan for an online processing system. An effective training program to introduce staff to the new system and increase confidence in it would aid in efficient implementation. A manual consisting of a detailed outline of the training plan and copies of all materials to be used should be developed prior to training sessions. Goals should be clear in terms of a minimal level of achievement given appropriate conditions. Experience and job level of the staff being trained should determine the structure of the training program, and materials should be presented in a sequence meaningful to the staff; different presentation methods and appropriate teaching aids should be used to match the learning patterns of as many staff as possible. Training would be evaluated both after a settling-in period, by participants and instructor questionnaires and by trainee quizzes and tests, in terms of its success in meeting stated goals. Follow-up sessions would be used to help eliminate misunderstandings and reinforce previous training. (CWM)

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STAFF TRAINING FOR ON-LINE PROCESSING SYSTEMS

by Pauline F. Micciche, Ohio College Library Center

ABSTRACT

The author proposes that libraries anticipating the use of an on-line processing system develop a training manual as part of the overall implementation plan for the new system. Suggested contents of the training manual and various methods of training staff members so that they can develop skills rapidly in system usage in an on-the-job environment are detailed.

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STAFF TRAINING FOR ON-LINE PROCESSING SYSTEMS

by Pauline F. Micciche, Ohio College Library Center

The literature about training for on-line systems in libraries has been primarily concerned with training for information retrieval systems. What of training for library processes and procedures? Both types of of training have common elements. Both must take into consideration the relationship between the user (the staff member) and the machinery being used. By machinery I mean both the physical machines used (terminals, modems, etc.) and the protocol for using the system. If the man-machine interface is neglected, implementation of the new system will be hampered by the staff's lack of confidence in it. The trainer must develop a training plan from a humanistic and job-oriented viewpoint, not from a mechanistic one. Each step in the training should be carefully planned and timed, and at each step the use of the system as a tool in the staff member's work should be emphasized.

The first hurdle to overcome in training library staff to use on-line systems is that of putting them at ease with the system. A person who has performed his job competently using a manual or even a batch system may feel apprehensive when faced with changes in his or her routines. The entire staff of the library, whether or not the system will affect them directly, should be given a brief introduction to the system. At this meeting, a person with some authority should outline how the new system is expected to affect each of the departments.

For staff who will be directly involved in the change, an additional smaller, less formal orientation meeting should be planned - over coffee perhaps. In this meeting, the trainer should attempt to ease the misgivings of the staff and should indicate that there will be training sessions before the system is put into operation. It is important for the trainer to be human as well as businesslike during the entire training process. The posture of exalted expert and the spouting of computerese may do wonders for the trainer's ego but does nothing to inspire self-confidence in the neophyte user. The trainer should concentrate on communicating the necessary knowledge as quickly and as thoroughly as possible. If it is feasible, the person who trains the staff who will be using the system should be the appropriate supervisor. During the first training session, the trainer should provide the staff to be trained with a written list of the objectives of the training and an outline of the proposed workflow, especially as it relates to the individuals being trained.

The trainer should develop a training manual for the system prior to beginning the sessions. It should consist of a detailed outline of the training plan and copies of all materials to be used in the training. The outline of the training plan should be in the form of a chart which indicates the sequence in which elements of the system will be taught, the user level at which each element should be taught, the objectives of the training and type of learning required, the method of presentation, the materials to be used, and the method of evaluation. See Figure 1 for an example of a form for the general training outline.

a. Presenting the elements of the system in sequence.
It is important to present various training components in the sequence most meaningful to the trainee. The most meaningful sequence for a trainee will largely depend upon the duties he or she must perform. Some meaningful sequences from which the trainer may choose are:

1) From the general to the specific.
The trainee who has had little or no experience with computerized systems in general will usually find it easier to comprehend the overall functioning of the system before learning any details. Even more experienced users can usually benefit from this approach.

2) From the specific to the general.
The trainee who has had some experience with a similar system may find it easier to start with a familiar detail and proceed to an overview of the whole.

3) Interest sequencing.
In order to keep the trainee's interest it may be useful to isolate those elements of the system which are of the most interest to him or her. In interest sequencing, one of these "most-favored" elements is the first element taught, and the other "most-favored" elements are scattered throughout the presentation.

4) Logical sequencing.
Sometimes one must know certain elements of the system in order to understand another element. In these cases, the elements necessary to the understanding of the other element must be taught first. Trainers should be cautious in their use of this method of training. For example, it is necessary to know what is meant by a personal author main entry before one can be taught to tag it with the MARC tag 100, but it is not necessary to know what an imprint is to tag the main entry field. Trainers should be cautious about including prerequisite training which is not actually needed for an understanding of a particular

element. For example, it is usually not necessary for the input typist to understand the mechanics of the modem when the modem is connected to a dedicated telephone line.

5) Skills sequencing.
If all the elements of a system cannot be taught during the time available to the trainee, or if some trainees must leave the session early, it may be advisable to sequence the session or a group of sessions so that each section presents one set of skills needed to perform a particular function. In this way the trainee can immediately put the information to work in an on-the-job environment. For example, although terminal usage is common to all on-line cataloging systems, a librarian doing original cataloging or extensive catalog copy revisions will often catalog using a hard copy workform instead of the terminal. In such a case, it would be better to give the cataloger a thorough grounding in tagging, leaving training in the operation of the terminal until the cataloger needs to use the terminal.

6) Frequency sequencing.
In this method, the trainee is taught first those elements he or she will use the most. For example, a paraprofessional responsible for searching the on-line catalog for newly received publications and cataloging those titles for which exact or close matches are found will ordinarily need to search more often than to change bibliographic data. He or she would then be taught to search before being taught to change data.

b. Shared responsibility for developing the lesson plan.
When the list of elements to be taught has been put into the most efficient sequence, a training team should be established, preferably including the supervisors of the employees most affected by the new system. Each of the members of the training team will take responsibility for developing the rest of the plan for an equitable number of elements isolated in the initial planning step. The trainer responsible for a particular subsequence of elements will prepare copies of materials, outlines, etc. which may be needed to teach that particular subsequence.

Prerequisites.
In planning a training program for a new system, the trainer may be able to make use of parts of the earlier training plans for systems. It is important that elements common to all systems (such as library terminology) be the subject of separate training manuals. This eliminates the need to revise many manuals when it is necessary to update the training for one component.

Formulating Objectives.

Use the type of performance expected at the end of the training as a starting point. Develop a behavioral objective for each item in the training plan chart. According to Gallegos and Phelan there are three elements that each training objective must specify:

Terminal behavior
Conditions, and
Minimum level of achievement

a. Terminal behavior should be described in terms of an action that can be observed. Identification of the type of performance which will be expected at the end of the training will be useful not only in planning the training itself but also in evaluating the training later.

Magner and Beach have put forth five categories of performance, of which four are applicable to training for on-line systems.

1) Discrimination.
Being able to tell the difference between two or more things. To tell when a proper job has been done, to tell when a task needs to be done, or to see the difference between what is correct and what is incorrect involves discrimination. For example, a cataloger can determine whether or not the book in hand can be cataloged using an existing bibliographic record without creating a new one in the on-line catalog.

2) Problem-solving
The process of finding solutions to problems. Problem-solving is taught by showing the user relationships between symptoms and possible causes. For example, a clerk cannot locate an order record and determines that there is a typographical error in the search key he or she used.

3) Recall.
Knowing what to do, what to use, and the order or sequence in which to perform a task are examples of recall performance. For example, in a manual system, the filer should alphabetize subject entry cards before filing them in the subject catalog.

4) Manipulation.
The ability to use tools or devices to accomplish a given task. A user may know what to do but lack the ability to do it. For example, a user who wishes to use a dial-up terminal must know how to set the number of characters per second if the terminal has multiple options.

Figure 5 lists some of the verbs which are suitable for use in describing each of the four types of terminal behavior. When formulating objectives, avoid non-behavioral verbs such as 'to know,' 'to understand,' 'to think,' 'to remember,' and 'to recognize.' It is impossible to evaluate what is going on in a person's brain.

b. Conditions are concerned with what is provided or denied the trainee while he or she is performing the terminal behavior. For example, if the terminal behavior is to be able to tag monographic records, the conditions might be stated as: 'given surrogate title pages, a copy of On-line Cataloging, and printed tagging worksheets." The conditions stated should be as close to those which will be found in an actual working situation as possible.

c. Minimum level of achievement is concerned with the quantitive or qualitative measure of excellence or performance. For example, in the case of monographic cataloging, above, the minimum level of achievement might be stated as: 'correctly tagging, indicating, and delimiting ten monographic records of moderate difficulty. Moderate difficulty assumes that experienced catalogers agree on the basic cataloging rules to be applied.' This part of an objective leads directly into the evaluation of the training sessions as a whole.

User level.

There are two types of user levels which must be considered in planning training sessions, experience with batch or on-line automated systems and job level.

a. Experience level.
Each item in the sequenced list should be given a user experience level number. A user at a lower level must also be trained in those elements with a higher level number.

Level No.	Experience
1	never used an automated system
2	uses a batch system
3	uses an on-line system
4	uses another component of the system to be taught

If any of the items in the sequenced list have a lower level number than the level of the users to be trained, that item may be dropped from the actual training session.

b. Job level.
Different job levels ordinarily have different duties assigned to them. If the trainer is using either skills or frequency

sequencing, it will be important to know at what job level the trainees will be. Codes for these levels are:

C	Clerical
P	Paraprofessional
L	Professional

Methods of presentation.

For each item on the list, the trainer should recommend several methods of presentation. Marcus, Benefeld, and Kugel report that the following user behaviors caused difficulties in instruction during training for Intrex.

(1) Failure of users to notice even the most explicit instructions. (For example, "Please don't forget the carriage return.")

(2) The fact that no single instruction method or booklet, no single 'style' of presentation, no single compromise between brevity and completeness, seems to satisfy all, or even a majority of users.

(3) On the other hand, if there are too many instructional options, users tend to ignore them all. We refer to this as the "clutter effect". Users seem to prefer to be given instructions only when they need them.

(4) Users do not like to spend time to prepare themselves for system use. In general, they want to ignore the system and focus on its use.

(5) Users assume that the given system works like some other system (e.g., the traditional library catalog) that they already know about. Some users seem not to like to learn anything new, or unfamiliar.

(6) Some users suffer from an extreme case of what we might call "computer Angst" of fear of the machine. Such fear seems to come in two varieties, the fear of the user who is anxious about making a mistake because he will appear foolish, and the fear of the user who is afraid his actions will damage the system. The "Angst" is less severe in the young and in those with some computer experience. Some users suffer from "people Angst" or fear of asking human advisers for help.

(7) Users often assume that the computer is a giant brain that will do their thinking for them or that it is so complex that they cannot possibly understand it. They therefore assume they need not or cannot understand the system and this impedes learning.

These should be kept in mind when planning the training for any new system. Obviously, methods of and materials for

presentation should be mixed and matched in order to overcome problem 2 above.

a. Lecture presentation.
Lecture presentations are the easiest for instructors to prepare and require the least amount of time, but also require some degree of showmanship to be effective. Showmanship should be used only to get the user's attention and to impact his memory. Rebedeau suggests using some of the following elements for this purpose:

Mystery
Realism
Life
Motion
Timeliness
Pictures
Color
Sound
Conflict
Beauty
Drama
Contrast
Demostrations
Costuming
The Bizarre

The trainer should remember that these techniques are used to underline an element in the subsystem, not obscure it. Some of the tricks above may not be usable in a given presentation. Most will have to be toned down to avoid obscuring the point to be made. For example, mystery can be injected by simply asking a question you intend to answer as part of the training, and pausing slightly before actually beginning the answer.

Lectures will also have more memory impact if they are liberally sprinkled with examples which show both the similarities and the differences between the on-line system and traditional off-line systems. Visuals which are pertinent and easy to see are also helpful.

b. Discussion or conference presentation.
This method is suitable for training one or two persons at a time. It should always be accompanied by some other form of instruction, such as demostration or practice. It is especially suitable for the training given by the supervisor prior to full implementation.

c. Demonstration.
Although Rebedeau listed this as a method of enhancing the lecture presentation, it should be considered a presentation method in itself because it can be com-

bined with methods of presentation other than the lecture. It is especially useful when combined with practice.

d. Practice.
The incorporation of as much actual experience in performing the behaviors being taught is essential to developing skills quickly in an on-the-job environment. (Practice in individual skills, however, cannot be substituted for well thought out implementation plans and procedures in the individual library.) Some of this practice may actually be done in an off-line environment, as is the case with practice in tagging.

The development of materials for such practice is discussed in the section on materials and training aids. This is the most important element in training personnel in the use of on-line systems.

e. Behind-the-shoulder instruction.
This is one-to-one instruction, with the instructor acting as a knowledgeable friend at the terminal. It is often very effective, but it is costly because the trainer can handle only one trainee at a time. Seldom will there be an opportunity to employ this method in isolation. Combined with practice, it gives added reinforcement to other presentation methods. Another advantage of this method is the opportunity it affords to use 'live' data in an on-the-job environment with minimal risk of errors.

f. Audio-visual presentation.
This method of presentation is often incorporated within a general lecture outline. Like many other methods of presentation, it is seldom able to stand alone. See the section on materials and training aids for more information about this method of presentation.

g. "Programmed" and computer-assisted instruction.
Both 'programmed' and computer-assisted instructions are based on an attempt to break down the subject matter into highly organized, logically sequenced bits of information. They both require the trainee to give responses to frequent test questions. If a trainee's response is correct, he is told so and is advised to go on to the next "frame" or bit of instruction. If the response is wrong, the trainee is told this too, and given more explanatory material to study. This is followed by another test question.

If the 'program' is well designed, this method is very effective in promoting recall, and sometimes discrimination. However, designing, testing, and revising a 'program' takes an enormous amount of time, although less than that needed for behind-the-shoulder instruction of a large number of trainees.

(1) 'Programmed' text instruction is not suitable for training in a rapidly changing system because these texts become out-of-date rapidly. It may be useful for components and procedures which are fairly stable and which are employed in several departments or for training when an up-to-date text is readily available.

(2) Computer-assisted instruction, including instructive messages, provides much needed individual instruction in the job situation, not only for library personnel but for the patrons who are given access to the on-line terminals. CAI is usually too expensive for an individual library to develop alone.

h. Simulation.
Simulation can best be used in individual institutions where the simulation can be a walk-through of the institution's new procedures. A simulation can also be used within other presentation methods as an example of a system's use.

i. Role-playing.
Role-playing is closely akin to simulation but is individual in application. It can be used to reinforce other teaching methods. For example. one person can be chosen from a small training group to act as a reference librarian. Following a script or acting ad lib, others in the class can act as patrons. The librarian could then teach the patrons how to search for materials in the on-line catalog.

j. Panel and point-counter-point presentation.
Panel and point-counter-point presentation are not suitable for teaching the essentials of a system. They may be useful in the orientation phase of training.

k. Question and answer presentation.
Although every training session should provide time for questions, this method will prove most useful in follow-up training.

Materials and teaching aids.

After choosing the basic methods of presentation most suitable to achieving the training objectives, the trainer should prepare a list of those training materials and teaching aids which will be needed during the presentation. Copies of the actual materials as well as the list should be included in the Instructor's Manual when possible.

a. Documentation.
Official documents are of most use to the trainee after he or she begins performing in the on-line environment. The trainer should reference pertinent pages during the training.

1) Procedures Manual.
One of the most valuable aids for the user is a reference manual detailing the interface between the user and the system. This manual alone, no matter how well written, does not help the user develop the skills needed in on-line usage in an on-the-job environment. Its use may be one of the conditions stated in the objectives.

2) Quick Reference Guide.
A reference guide containing the search keys, codes, etc. which need to be referenced most often in the operating environment also helps the trainee become efficient in the on-line environment without undue delay.

b. Practical aids.
A practical aid is a teaching device or learning tool that is concerned with the recognition of specifics or the performance of actions which will be necessary when using the target system or component. Practical aids include examples; practice exercises; programmed instruction workbooks, cassettes, etc.; trainer or supervisor-assisted practice; computer-assisted instruction, system messages, etc.; and a practice data base.

Practical aids are essential if personnel are to develop skills quickly in on-line usage in an on-the-job environment.

c. An audio-visual aid is a teaching device or learning tool that is concerned with the auditory sense (hearing) or optical sense (seeing). These are used primarily as aids in imparting memory and focusing attention during training sessions. Commonly used audio-visual aids include audio cassettes and recordings, video tape, motion pictures, filmstrips, slides, vuegraphs, charts and diagrams, flipcharts, the blackboard, hard copy handouts of samples and examples, and closed circuit television. Each of these should be examined for possible use in a presentation.

Evaluation of training.

There are three basic methods of determining whether or not a training session has been effective, (a) quizzes or tests of knowledge, skill and judgment (b) evaluation by the instructor, and (c) evaluation by the participants.

a. Quizzes or tests
These usually decrease in objectivity according to the type of test: multiple choice, fill-in the blanks,

essay, and oral report. It is also important to remember the trainees are adults, rather than children, and to structure any tests accordingly.

b. Evaluation by the instructor.
Often the instructor can evaluate the effectiveness of training by gauging the response of the trainees during the session, and noting the number and kinds of questions asked for a period of time after the session. This tends to be a highly subjective method of evaluation and is best employed by the supervisor who has trained the employee.

c. Evaluation by the participants.
This should be obtained at two times:
* at the end of the session
* after a stated interval of time after the training (follow-up).

Analysis of these evaluations are essential for planning proper follow-up procedures. See Figure 7 (Sample Evaluation Questionnaire).

Time frame and planning.
A PERT chart should be developed to help in managing the training project. A PERT chart lists each task (enclosed in a bubble) and shows a target date for its completion. See Figure 2.

After the evaluation of the follow-up training evaluation questionnaire, it may be necessary to schedule "refresher" sessions for those desiring them. Don't stint on the follow-up training. It is better to spend a little more time making sure the staff understands what is expected of them, than to spend time later correcting mistakes resulting from misunderstandings.

Facilities and equipment.
The trainers are responsible for scheduling the location or room for the training session. This includes making arrangements for the room to be set-up according to the needs of the session, and the equipment and training aids needed. Responsibility for these arrangements may be delegated but it is the responsibility of the trainers to provide their delegates with all the information they will need to complete the arrangements.

Follow-up.
The follow-up session should be divided into three parts. Part one of the session will review the results from the questionnaire. Part two will be further instruction on the topics listed on the questionnaire as needing further explanation. During part three the staff will be encouraged to ask more questions and share their experiences. From this part of the follow-up session may come suggestions for the modification of the new system. It is essential that the re-training in part two be done before this part of the session begins. Questions or difficulties with the system may have been caused by inadequate understanding rather than by a defect in the system.

Summary

To summarize, there are nine major attributes of a successful training program.

1. The program is part of an overall implementation plan.

2. It inspires confidence in the staff.

3. It is thoroughly planned prior to the training.

4. It has clear goals in terms of a minimal level of achievement given appropriate conditions.

5. It is structured according to the experience and job level of the staff being trained.

6. It is presented in a sequence that is meaningful to the staff.

7. A variety of presentation methods are used in order to match the learning patterns of as many of the staff as possible.

8. The training is evaluated in terms of its success in meeting its stated goals after a settling-in period.

9. A follow-up session is held to eliminate misunderstandings and to reinforce the previous training.

Figure 1

General Training Outline

System _____ Date _____

Function _____ Trainer _____

Prerequisites _____ Sequence _____

Item	Level	Position	Objective	Presentation	Materials/Equipment	Evaluation

Figure 2

SIMPLIFIED PERT CHART

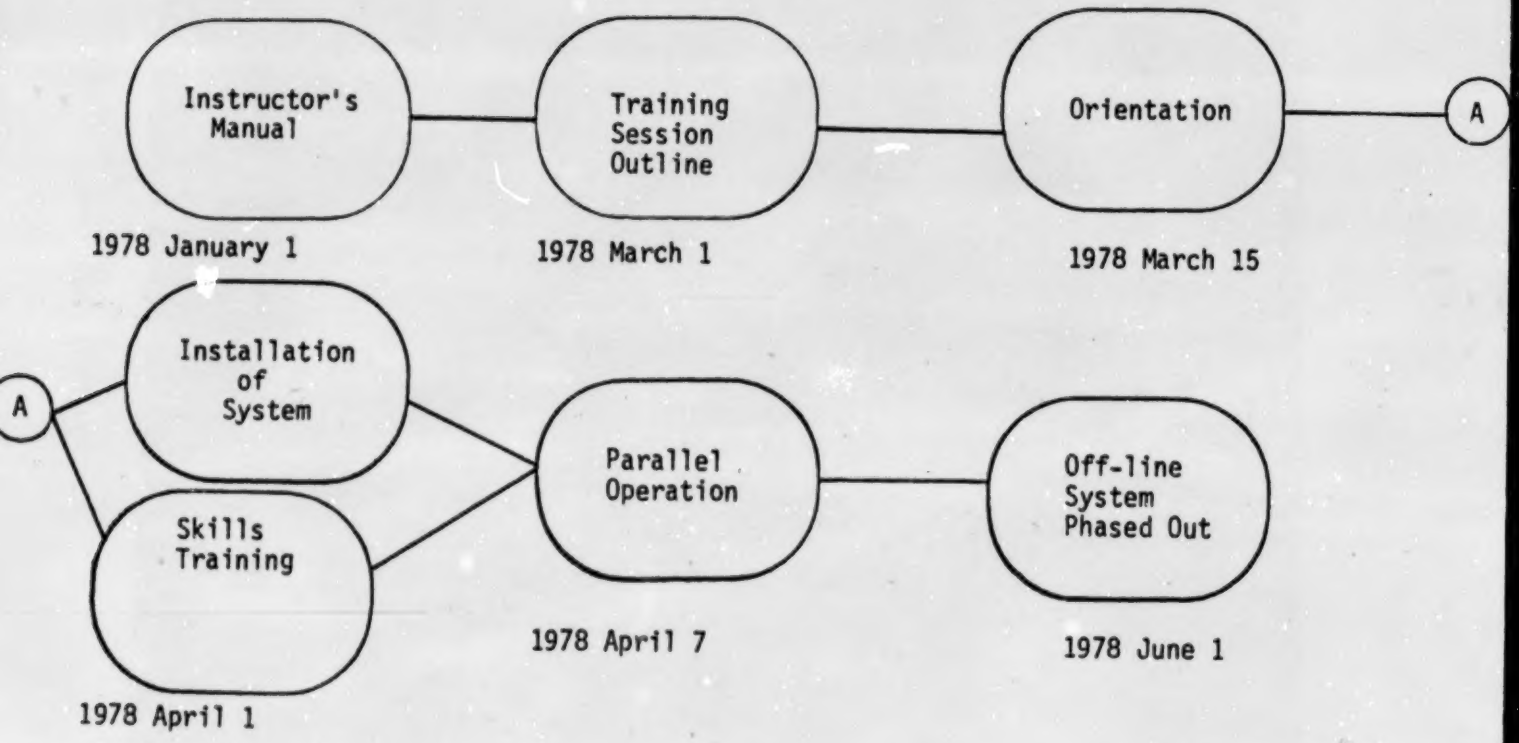

Figure 3

Meaningful Sequences

1. From the general to the specific.
2. From the specific to the general.
3. Interest sequencing.
4. Logical sequencing.
5. Skills sequencing.
6. Frequency sequencing.

Figure 4

Formulation of Objectives

1. Terminal Behavior

   Discrimination
   Problem-Solving
   Recall
   Manipulation

2. Conditions

3. Minimal Level of

   Quantitative
   Qualitative

Figure 5

Types of Performance

Type:	Terminal Behavior:
Discrimination being able to tell the difference between two or more things	To choose To match To identify To classify To select To differentiate To explain To tag
Problem-solving the process of finding solutions to problems	To solve To decide To trace To resolve To determine To judge To find To choose To adjust To explain To select
Recall knowing what to do, what to use, and the order or sequence in which to perform a task, etc.	To list To state To name To identify To express To explain To reproduce To call up a workform, etc.
Manipulation the ability to use tools or devices to accomplish a given task	To use To put into operation To start To end To key in a special charcter, etc.

Figure 6

User Levels

Level	Experience
1.	never used an automated system
2.	used a batch system
3.	used another on-line system
4.	used another component of the target system

Level	Job Classification
C	Clerical
P	Paraprofessional
L	Professional (librarian)

Figure 7

Sample Evaluation Questionnaire

XYZ System
Training Session

Participant Evaluation

☐ Post-session ☐ Follow-up Date _____

We are requesting your candid reactions and opinions concerning the Training Session for XYZ System.

The course objectives were defined as follows:

1. To search XYZ system for XYZ records using surrogates of XYZ data and the system reference guide.

2. To choose the most efficient search key for retrieving the XYZ records represented by surrogates of XYZ data using the system reference guide.

3. To create XYZ records given surrogates of XYZ data the system User's Manual and reference guide.

4. To delete XYZ records given surrogates of XYZ data and the system reference guide.

1. Overall reaction to training session (circle number on scale).

1	2	3	4	5	6	7	8	9	10
Didn't meet my needs, not worth my time				*Average, moderately worthwhile*					*Valuable information that will be useful in my work*

2. How appropriate are the objectives of the session?

1	2	3	4	5	6	7	8	9	10
Weak, inappropriate				*Satisfactory*					*Sound, highly appropriate*

3. How well were these objectives met?

1	2	3	4	5	6	7	8	9	10
Poorly met or not met at all				*Partially met*					*Met to a high degree*

4. Comments regarding training objectives.

_____

_____

_____

_____

5. To what degree are you using the concepts, information, and techniques now?

1	2	3	4	5	6	7	8	9	10
Not at all				*Average Application*					*To a great extent*

6. To what degree do you expect to use these concepts, information, and techniques in the future?

1	2	3	4	5	6	7	8	9	10
Not at all				*Average Application*					*To a great extent*

7. Comments regarding present/future application.

_____

_____

_____

_____

8. What factors have been most important in helping you understand and use the results of this session on the job? (e.g., practice exercises, user's manual, quick reference guide, class discussion)

_____

_____

_____

_____

_____

9. What would you recommend for changes in physical facilities, materials used, scope of training, and other procedures in the session?

_____

_____

_____

_____

10. Please evaluate each of the following topics, methods of presentation, etc. in terms of their usefulness or interest to you and the desirability of including them in future training sessions.

Use the following scale for evaluation.

1	2	3	4	5	6	7	8	9	10
Of no use or interest; should not be included				*Of some interest, probably should be included*					*Very useful and of great interest; definitely should be included*

Topic/Teaching Method	Evaluation
Search Keys Used in XYZ System	_____
Choosing the Most Efficient Search Key	_____
Creating an XYZ Record	_____
Deleting an XYZ Record	_____
Practice Exercises in Formulating Search Keys	_____
Quiz on Choosing Most Efficient Search Key	_____
Walk-through of hypothetical XYZ Transactions involving the Creation and Deletion of Records	_____

User's manual _____

Quick Reference Guide _____

Handouts _____

Videotape presentation _____

Lecture _____

11. List any other thoughts, suggestions, outstanding or poor features that you feel should be considered in the evaluation of the Training session?

_____

_____

_____

_____

12. Do you feel that a follow-up training session is desirable?

_____ YES _____ NO

Please list topics you feel should be covered.

_____

_____

_____

_____

_____

Signature/Date (Optional)

Adapted from:

Newall, Gale E. 'How to Plan a Training Program'
Personnel Journal, vol. 55 no. 5
(May 1976)

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ERRATA:

Page 4 "Magner and Beach" should be "Mager and Beach"

Page 6 "Marcus, Benefeld and Kugel" should be Marcus, Benenfeld and Kugel"